IDP for Supervisors

Module 3: Finalize Phase Responsibilities

What Is Your Role in the Finalize Phase?

After the employee has created a draft IDP in SATERN, one of the supervisor's primary responsibilities is to review and approve the IDP. This module will discuss the variety of tasks involved in the **Finalize** phase.

This module will cover the following tasks:

- Reviewing a Draft IDP with the Employee
- Recognizing IDP Submissions for Approval
- Selecting an IDP for Review
- Viewing Plan Details
- Making Comments
- Rejecting an IDP
- Approving an IDP

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Review a Draft IDP with the Employee

The first step involved in finalizing an IDP is to meet with the employee to review the draft IDP before it is submitted for your approval.

The purpose of this meeting is to:

- Ensure that the supervisor and employee are in agreement regarding specific goals and development activities

- Provide the employee with an opportunity to ask questions or seek clarification

- Discuss any relevant topics that may not have been raised in the initial supervisor meeting

- Offer suggestions for further ways to reach the employee's goals

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Recognize IDP Submissions for Approval

When an employee submits an IDP for your review, you will receive an email notification. The email will be from **NASA-satern** and the subject line will read:

SATERN Individual Development Plan Review and Approval Request

The email will instruct you to log in to SATERN to review the IDP.

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Select an IDP for Review

When you log in to SATERN, you will see an **Alert** in red text that there is an IDP waiting for your review.

Click this link to be directed to a list of all IDPs awaiting your review and approval.

Alerts

⚠ You have Subordinate Development Plans that require Review and Approval »

Click the red **Alert** text.

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Select an IDP for Review (cont.)

Choose the plan you wish to review.

Subordinate Plans for Review							
Learner Name	Plan Title	Version	Plan Period	Plan Status ▲	Effective Date	Approval Date	Expiration Date	Action
Nasa, Joe	Systems engineering	1	one year	Submit/Pending	12/23/2007 12:00 AM EST		12/31/2008 12:00 AM EST	Review

Click **Review**.

Clicking **Review** brings you into the employee's plan in the **View/Add Notes** mode. Before moving forward to review the IDP, be sure to orient yourself.

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Select an IDP for Review (cont.)

You can see whose plan you are viewing at the top of the page. Here you are **Currently Viewing: Joe Nasa**. If you need to return to your own records, click **Return to your records** at the top of the page. If you need to return to other employees plans, click **Return to Subordinate Plans** in the upper left of the page.

Welcome Jane Nasa | Currently Viewing: Joe Nasa | Return to your records | Home | ? Help | ⏻ Logout

| Personal | Learning | Career | Reports | My Employees |

- **Development Plan** ▪ View Your Competencies

Review Individual Development Plan

← **Return to Subordinate Plans**

The details of this individual development plan are shown below. If this plan is currently Active, you may update the status of certain activities and view or add notes to this plan. If you have permission and the plan is revisable, choose the **Revise** option. To select another development plan, choose the **View Other Plans** option.

Learner: Nasa, Joe
Systems Engineering
Plan Period: One Year   Expiration Date: 1/24/2009 12:00 AM EST   Coach/Mentor: Nasa, Jane
Plan Status: Submit/Pending   Approval Date: Plan Purpose: To support a career shift to systems engineering.

Version: 1 (This is the most recent version)   Effective Date:

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View Plan Details

To see the development activities listed under each goal, click the ▶ symbol to expand that section.

View Plan Details (cont.)

You can view further details about SATERN catalog items listed as development activities, including course descriptions, intended audience and scheduled offerings, by clicking **View Item Details**.

SHORT-RANGE GOALS: 1 YEAR				
Goal Name ▲	**Target Date**	**Priority**	**Related Competency**	**Action**
▼ Systems Engineering	2/13/2009	3	Systems Engineering (Level 1 Competency)	View/Add Notes

Description:

Development Activities ▲	Type	Target Date	Priority	Target	Action
APPEL-DEVELOPING AND IMPLEMENTING A SYSTEMS ENGINEERING MANAGEMENT PLAN	Catalog Item	2/13/2009	3		View/Add Notes / View Item Details
APPEL-LIFECYCLE, PROCESSES, AND SYSTEM ENGINEERING	Catalog Item	2/13/2009	3		View/Add Notes / View Item Details

Click **View Item Details**.

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Make Comments

Once you have viewed the IDP, you can add comments to any goal, activity, and/or the plan as a whole.

To add notes, click the **View/Add Notes** button next to the section on which you'd like to comment.

Click **View/Add Notes**.

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Make Comments (cont.)

The **Comments** page allows you to view any comments that have already been added to the selected section.

Comments can be made by the employee, supervisor, or by a coach or mentor. To add comments, type the text in the box provided and click **Add**. If you choose not to add comments, you can exit by clicking **Back** at the top of the screen.
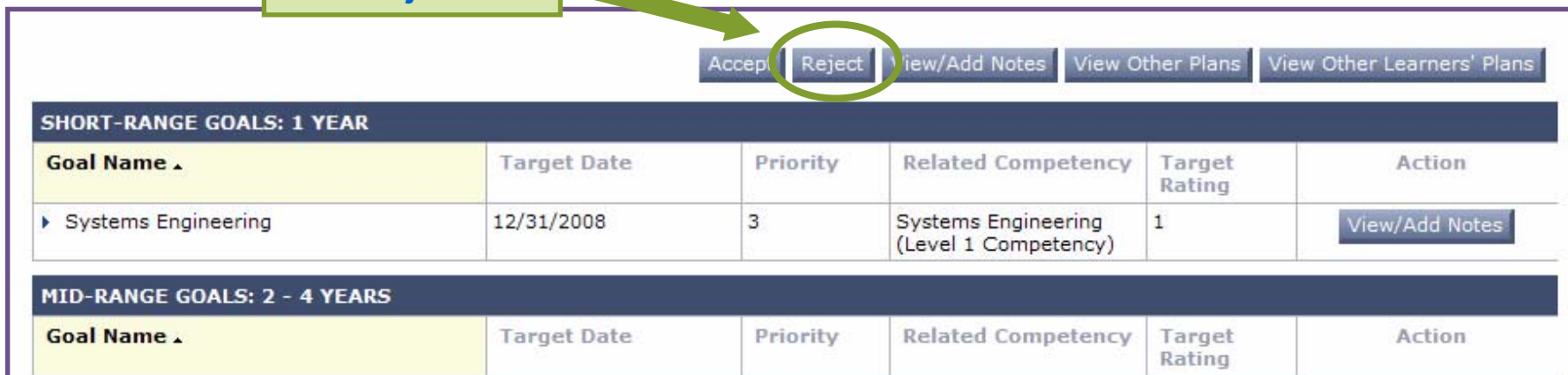
Add Comments

Enter comments.

Click **Add**.

Review Comments

Coach/Mentor, Nasa, Jane - 12/21/2007 02:47 PM EST
Please let me know what I can do to support your application!

View comments.

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Reject an IDP

If, after reviewing, there are further changes that need to be made (e.g., a course you discussed with the employee was not included in the plan), you can reject the IDP.

The employee will have the opportunity to revise the plan and resubmit.

Click **Reject**.

Reject an IDP (cont.)

If you choose to reject a plan, you are required to provide comments regarding the reason for the rejection.

To enter your comments, type your text into the box provided. Comments should be specific enough to guide employee revisions. Once complete, click **Reject**.

Add Plan Review Comments

Hi Joe-
I'm going to reject your plan right now, because if you're thinking about moving into systems engineering, I want you to start thinking about your long term goals. For example, did you know that SE certification is available? You might want to check out this website: Please take an introductory

Enter comment.

Click **Reject**.

Reject

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Reject an IDP (cont.)

Once you have entered comments and clicked **Reject,** you will see that the **Plan Status** is now listed as **Rejected**. An email notifying the employee of the rejection will be sent automatically. The employee will then be able to modify the plan and resubmit.

Approve an IDP

If you have reviewed the draft IDP and <u>agree</u> with the proposed goals and development activities, click **Accept**. You can approve an IDP the first time it is submitted, or you can approve the document after an initial rejection (once revisions have been made and the plan has been resubmitted for approval).

Click **Accept**.

| Accept | Reject | View/Add Notes | View Other Plans | View Other Learners' Plans |

SHORT-RANGE GOALS: 1 YEAR

Goal Name ▲	Target Date	Priority	Related Competency	Target Rating	Action
▶ Systems Engineering	12/31/2008	3	Systems Engineering (Level 1 Competency)	1	View/Add Notes

MID-RANGE GOALS: 2 - 4 YEARS

Goal Name ▲	Target Date	Priority	Related Competency	Target Rating	Action
▶ Develop a better agency-wide perspective	12/31/2008	3			View/Add Notes
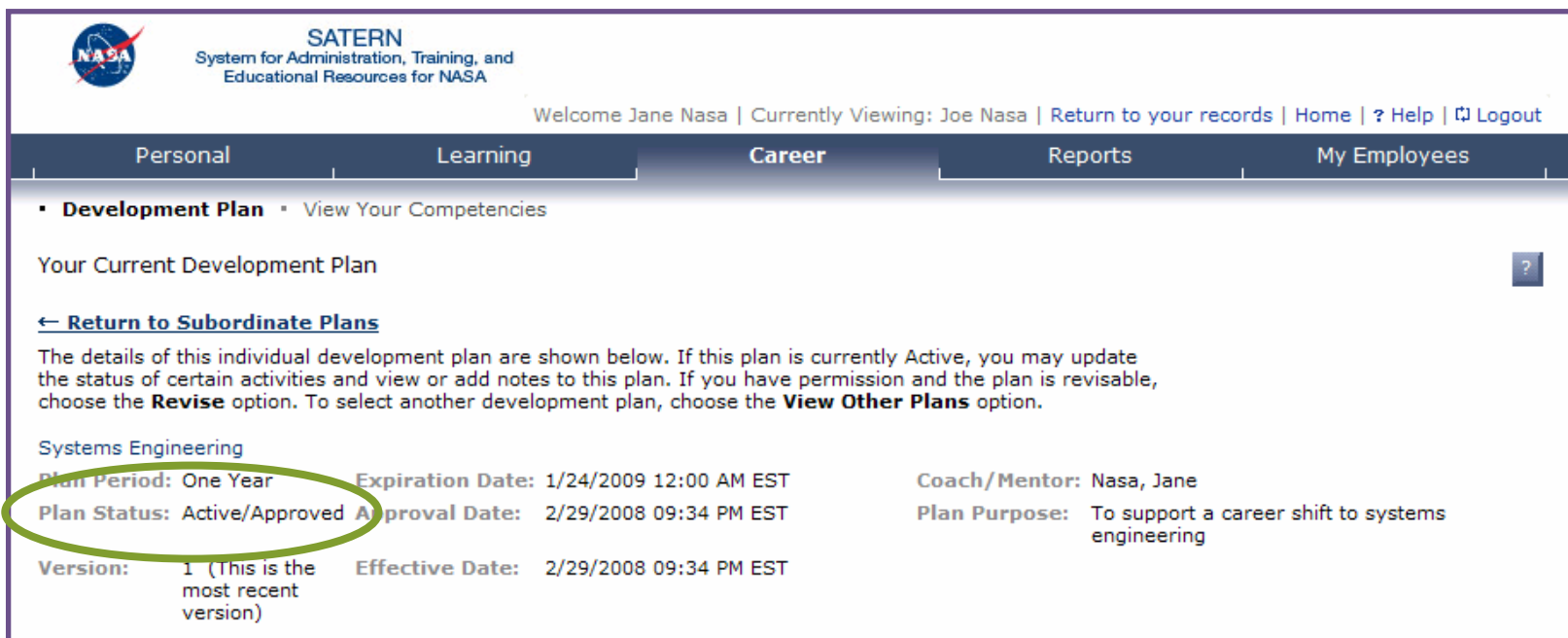
LONG-RANGE GOALS: 5 YEARS AND BEYOND

There are no goals defined for this section.

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Approve an IDP (cont.)

The **Plan Status** will now read **Active/Approved**.

The employee will receive an email indicating that the IDP has been <u>approved</u>. On the IDP's **Effective Date**, the employee will receive a second email indicating that the IDP is <u>active</u>.
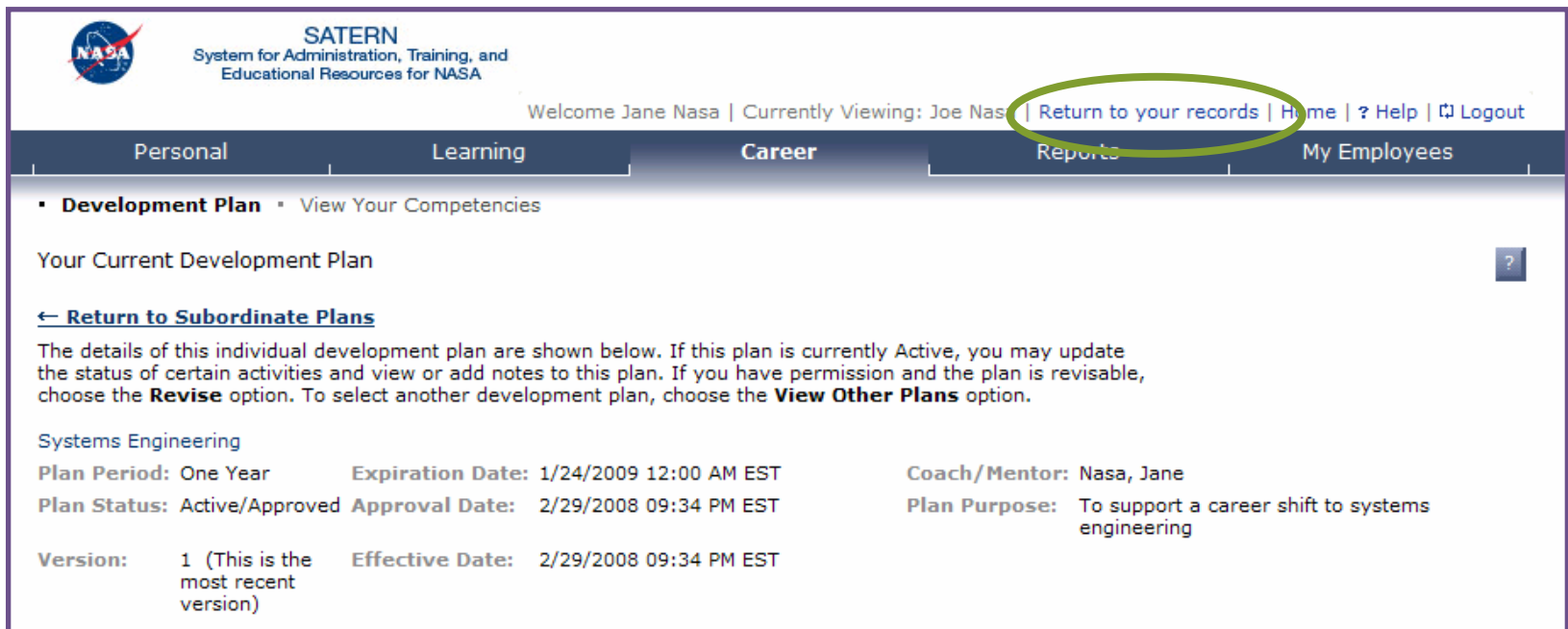
Return to Your Documents

Once you have approved the plan, you can exit the employee's plan. To do this, click **Return to your records** at the top of the page.